

[First Hit](#) [Fwd Refs](#)

Generate Collection

Print

L6: Entry 40 of 56

File: USPT

May 23, 2000

DOCUMENT-IDENTIFIER: US 6067537 A

TITLE: System, method and article of manufacture for a goal based educational system with support for dynamic personality feedback

Detailed Description Text (41):

To date, Web development tools have been limited in their ability to create dynamic Web applications which span from client to server and interoperate

Detailed Description Text (50):

Enabling the creation of dynamic, real-time Web applications; and

Detailed Description Text (346):

An activity is a business event, such as planning a company's financials or closing the books. Business events set the context of the course. Students learn the content so that they can complete the goals associates with each business event. The power of a GBS is in how it embeds the content a student needs to learn within the context of the business events.

Detailed Description Text (1073):

FIG. 75 presents the detailed design of smart spreadsheets in accordance with a preferred embodiment. Processing commences at function block 7500 where the excel spreadsheet is designed to model to perform scenario planning for the application that the business simulation is targeted for. By way of example, a model for real estate that analyzes an own versus rent decision is utilized to convey features in accordance with a preferred embodiment. Function block 7510 illustrates the next step which entails associating drivers for specific analysis tasks that are used in the model. For example, the price of unit, down payment, tax rate, estimated appreciation, assessment, rent, annual rent increase, type of loan, and salary will each be utilized in evaluating an formulating the decision. Then, at function block 7520, a loan amortization schedule is created to track the ten year equity growth, tax savings, portfolio value, net gain/loss schedules.

Other Reference Publication (9):

Automate Your Business Plan--financial statement ratio analysis screen capture [online]. Automate Your Business Plan, 1999 [retrieved on Aug. 9, 1999]. Retrieved from the Internet: <URL:www.business-plan.com/screen2.html>, Jan. 1999.

First Hit Fwd Refs

Generate Collection

Print

①

L3: Entry 1 of 3

File: USPT

Dec 30, 2003

DOCUMENT-IDENTIFIER: US 6671673 B1

TITLE: Method for integrated supply chain and financial management

Abstract Text (1):

A method to generate a strategic business plan to improve operations, and to closely monitor various performance measures of an enterprise. This is accomplished employing a more comprehensive approach to maximizing profitability, increasing revenue, and explicitly considering risk. In particular, the method extends supply chain management using financial management considerations, extends financial management using supply chain management considerations, employs supply chain management techniques to improve financial management, and employs financial management techniques to improve supply chain management. The method uses information and models derived from at least one of the following business processes: accounting; cash management; funds management, financing, profitability analysis, risk management, loan management, treasury management, investments management, business development, order management, demand planning and forecasting, procurement, production planning, inventory management, transportation and distribution, and supply chain design.

Brief Summary Text (16):

Current accounting solutions are capable of the following: General Ledger--Central repository of accounting transactions; Accounts Receivable and Payable--Tracks customer sales and receipts, and vendor purchases and payments; Asset Accounting--Tracks fixed assets; Funds Management--Tool for planning, managing and monitoring a firm's funds; and Activity-based costing--Monitors and controls costs of cross-departmental business processes, functions and products.

Brief Summary Text (17):

Current financial management solutions are capable of the following: Profitability analysis--Analyzes sources of profits. Revenues are matched with costs by market segment, or other business rules. Critical decision support tool for product pricing, customer selection, targeting distribution channels, etc.; Corporate-wide budgeting--Investment planning and budgeting for the entire enterprise. Tracks available budgets, and compares planned and incurred costs; Cash Management--Provides information on sources and uses of funds to ensure liquidity to meet payment obligations. Supplies data for managing short-term investments and borrowing; Treasury Management--Manages the treasury function, including foreign exchange and electronic funds transfers; Loan Management--Automates loan-manage process, and tracks interest and repayment terms; and Risk Management--A set of tools to monitor and assess risk, usually using value-at-risk measures.

Brief Summary Text (29):

Application cases have been reported in P. S. Bender, W. D. Northup and J. F. Shapiro, "Practical Modeling for Resource Management," Harvard Business Review, pp. 163-173 (March-April 1981), in the paper industry; in R. L. Breitman and J. M. Lucas, "PLANETS: A Modeling System for Business Planning," Interfaces, pp. 94-106 (January-February 1987) for the automobile industry; in Cohen and Lee and in B. C. Arntzen, G. G. Brown, T. P. Harrison and L. L. Trafton, "Global Supply Chain Management at Digital Equipment Corporation," Interfaces, pp. 69-93 (January-February 1995) for computer assembly. The model of Arntzen et al. builds on the

models of Cohen and Lee (1989) and Huchzermeier (1991) by explicitly considering issues such as duty drawbacks and tariffs. Operational hedging is discussed by Panos Kouvelis in "Global Sourcing Strategies under exchange rate uncertainty". Gordon Gilstrap, "Contribution of Logistics and Supply Chain Management to Shareholder Value," The Sematech Semiconductor Logistics Forum, November 1999, indicates that in the future there will be linkages between financial flows and other aspects of the supply chain, but provides no further detail.

Brief Summary Text (36):

According to the invention, a strategic business plan is generated to assist decision-making, and to closely monitor various performance measures of an enterprise by extending supply chain management using financial management considerations. The method uses information and models derived from at least one of the following planning processes: Supply chain management--designing a supply chain model for a firm utilizing firm-specific information including strategic objectives, a desired level of risk, market position of the firm and industry competitive landscape; extended demand planning--determining which customer demands to fulfill, and when to fulfill them, while factoring in demand uncertainty, capacity and time constraints; inventory management--developing inventory policies to service stochastic customer demand, using information related to service targets, budgets, stock out probabilities and costs and demand fulfillment rates; procurement planning--mitigating foreign exchange risk by considering the firm's global foreign exchange position using vendor selection, thereby reducing foreign exchange exposures; and production planning--dynamically shifting production in coordination with procurement planning to locations with weak currencies, thereby reducing production costs.

Detailed Description Text (33):

For each supply chain management activity in the planning activity, a determination is made as to whether the activity/solution is affected by FM information, in decision block 202. Being affected by FM information means that improvements in strategy, tactics, planning, or operations would result by broadening the scope of information available through integration. FM information is information used by, useful for, required by, or available to, FM activities or solutions. Examples of Financial management activities or solutions include: foreign exchange risk management (including management of economic exposures, transactional exposures, and accounting exposures), working capital management (including short-term financing, trade financing, current asset management, inter-company financial management, and cash management), investment analysis (including analysis of portfolio investments, foreign direct investments, capital budgeting), capital structure strategy and implementation, risk management, tax management, foreign investment analysis (including analysis of portfolio investments, and foreign direct investments), foreign operations financing, international financing, special financing vehicles, and global financing strategy.

Detailed Description Text (62):

This approach extends traditional supply chain location decisions, which determine where new facilities should be located. A number of dividend repatriation considerations can be used to improve location decisions. For example, implicit and explicit costs associated with dividend repatriation can be included in location decisions. This can be done by considering national dividend repatriation policies for alternative sites, and in particular any constraints on dividend repatriation. These can then be coordinated with the firm's projected cash requirements. In addition, the firm's business design--and withholding tax treaty network--can be analyzed to determine the financial impact of dividend and interest withholding taxes on location decisions. Thus, for example, if a firm anticipates a continuous need to repatriate dividends to meet projected cash obligations, it might favor sites in jurisdiction with more liberal dividend repatriation regulations. Alternatively, for a firm anticipating redeployment of capital for future investments in the location being considered, dividend repatriation restrictions

should be given less weight.

Detailed Description Text (68):

This approach extends traditional supply chain sourcing decisions, which determine which production facilities or suppliers should be used to manufacture a particular product. A number of dividend repatriation considerations can be used to improve sourcing decisions. For example, implicit and explicit costs associated with dividend repatriation can be included in sourcing decisions. This can be done by considering national dividend repatriation policies for alternative sources, and in particular any constraints on dividend repatriation. These can then be coordinated with the firm's projected cash requirements. In addition, the firm's business design and withholding tax treaty network can be analyzed to determine the financial impact of dividend and interest withholding taxes on sourcing decisions. Thus, for example, if a firm anticipates an immediate need to repatriate dividends to meet projected cash obligations, it might transfer more profitable production to sites in jurisdiction with more liberal dividend repatriation regulations. Alternatively, for a firm anticipating redeployment of capital for future investments for a particular production facility, dividend repatriation restrictions should be given less weight.

Other Reference Publication (6):

Breutman, R.L., et al., "PLANETS: A Modeling System for Business Planning", Interfaces, pp. 94-106, Jan.-Feb., 1987.

Other Reference Publication (8):

SAP AG, SAP's Supply Chain Management Initiative--Information, pub. date unknown, web pages from <http://www.sap.com>.

Other Reference Publication (9):

SAP AG, "R/3 System Financial", pub. date unknown, web pages from <http://www.sap.com>.

Other Reference Publication (10):

Baan Company NV, pub. date unknown, web pages from <http://www2.baan.com>.

Other Reference Publication (11):

Oracle, "Oracle Applications", pub. date unknown, web pages from <http://oracle.com>.

Other Reference Publication (12):

IBM, "New Oracle Tools Tap ERP's Potential", pub date unknown, web pages from <http://itirc.ibm.com>.

Other Reference Publication (13):

Author unknown, "Oracle Releases Strategic Enterprise Management", pub. date unknown, web pages from <http://www.lahaaland.com>.

CLAIMS:

1. A method to assist decision-making, and to closely monitor various performance measures of an enterprise by extending supply chain management using financial management considerations, said method being performed on a computer and comprising the steps of: selecting at least one activity or solution related to supply chain management for consideration using a computer resource; determining whether the selected at least one activity or solution is affected by financial management information, and if so, then integrating the affecting financial information with information related to the selected at least one activity or solution using a computer resource; developing a process to generate a strategic or operational business plan that provides a solution for the selected at least one activity or solution related to supply chain management using a computer resource; determining

whether the process is affected by financial management objectives, and if so, then integrating the affecting financial management objectives with objectives related to the process using a computer resource; determining whether the process will benefit from utilizing financial management techniques, and if so, then employing financial management techniques benefitting the process using a computer resource; selecting the financial management techniques from the group of value at risk techniques, option valuation analytics, and portfolio management techniques using computer resources; and performing the process using information, objectives, risk management objectives, and techniques associated with the at least one selected activity or solution including information, objectives, risk management objectives integrated in the determining steps, and using financial management techniques identified as beneficial to the process using a computer resource.

Refine Search

Search Results -

Terms	Documents
L6 and capital near3 investment\$1	0

Database:

US Pre-Grant Publication Full-Text Database
 US Patents Full-Text Database
 US OCR Full-Text Database
 EPO Abstracts Database
 JPO Abstracts Database
 Derwent World Patents Index
 IBM Technical Disclosure Bulletins

Search:

L8

Search History

DATE: Thursday, April 22, 2004 [Printable Copy](#) [Create Case](#)

Set Name Query

side by side

Hit Count Set Name

result set

DB=USPT; PLUR=YES; OP=OR

<u>L8</u>	L6 and capital near3 investment\$1	0	<u>L8</u>
<u>L7</u>	L6 and capital investment\$1	34775	<u>L7</u>
<u>L6</u>	L5 and business near3 plan\$4	56	<u>L6</u>
<u>L5</u>	web near1 application	2746	<u>L5</u>
<u>L4</u>	L2 and internet	4	<u>L4</u>
<u>L3</u>	L2 and web	3	<u>L3</u>
<u>L2</u>	L1 and capital near3 investment	6	<u>L2</u>
<u>L1</u>	(business\$2 near3 plan\$4) and management near3 tool\$1	77	<u>L1</u>

END OF SEARCH HISTORY

Hit List

Clear	Generate Collection	Print	Fwd Refs	Bkwd Refs
Generate OACS				

Search Results - Record(s) 1 through 3 of 3 returned.

☐ 1. Document ID: US 6671673 B1

L3: Entry 1 of 3

File: USPT

Dec 30, 2003

US-PAT-NO: 6671673

DOCUMENT-IDENTIFIER: US 6671673 B1

TITLE: Method for integrated supply chain and financial management

Full	Title	Citation	Front	Review	Classification	Date	Reference	Attachments	Attachments	Claims	KWIC	Draw De
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☐ 2. Document ID: US 6292830 B1

L3: Entry 2 of 3

File: USPT

Sep 18, 2001

US-PAT-NO: 6292830

DOCUMENT-IDENTIFIER: US 6292830 B1

TITLE: System for optimizing interaction among agents acting on multiple levels

Full	Title	Citation	Front	Review	Classification	Date	Reference	Attachments	Attachments	Claims	KWIC	Draw De
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☐ 3. Document ID: US 6078904 A

L3: Entry 3 of 3

File: USPT

Jun 20, 2000

US-PAT-NO: 6078904

DOCUMENT-IDENTIFIER: US 6078904 A

TITLE: Risk direct asset allocation and risk resolved CAPM for optimally allocating investment assets in an investment portfolio

Full	Title	Citation	Front	Review	Classification	Date	Reference	Attachments	Attachments	Claims	KWIC	Draw De
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Clear	Generate Collection	Print	Fwd Refs	Bkwd Refs	Generate OACS
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Terms	Documents
L2 and web	3

Display Format: **Change Format**

[Previous Page](#)

[Next Page](#)

[Go to Doc#](#)

Hit List

[Clear](#) [Generate Collection](#) [Print](#) [Fwd Refs](#) [Bkwd Refs](#)
[Generate OACS](#)

Search Results - Record(s) 11 through 20 of 56 returned.

☐ 11. Document ID: US 6625651 B1

L6: Entry 11 of 56

File: USPT

Sep 23, 2003

US-PAT-NO: 6625651

DOCUMENT-IDENTIFIER: US 6625651 B1

TITLE: On-line transaction control during activation of local telecommunication service

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Claims	Keywords	Drawings
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☐ 12. Document ID: US 6615166 B1

L6: Entry 12 of 56

File: USPT

Sep 2, 2003

US-PAT-NO: 6615166

DOCUMENT-IDENTIFIER: US 6615166 B1

TITLE: Prioritizing components of a network framework required for implementation of technology

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Claims	Keywords	Drawings
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☐ 13. Document ID: US 6611867 B1

L6: Entry 13 of 56

File: USPT

Aug 26, 2003

US-PAT-NO: 6611867

DOCUMENT-IDENTIFIER: US 6611867 B1

TITLE: System, method and article of manufacture for implementing a hybrid network

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Claims	Keywords	Drawings
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☐ 14. Document ID: US 6611822 B1

L6: Entry 14 of 56

File: USPT

Aug 26, 2003

US-PAT-NO: 6611822

DOCUMENT-IDENTIFIER: US 6611822 B1

**** See image for Certificate of Correction ****

TITLE: System method and article of manufacture for creating collaborative application sharing

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Claims	FIGS	Draw Dg
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☐ 15. Document ID: US 6606744 B1

L6: Entry 15 of 56

File: USPT

Aug 12, 2003

US-PAT-NO: 6606744

DOCUMENT-IDENTIFIER: US 6606744 B1

TITLE: Providing collaborative installation management in a network-based supply chain environment

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Claims	FIGS	Draw Dg
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☐ 16. Document ID: US 6549893 B1

L6: Entry 16 of 56

File: USPT

Apr 15, 2003

US-PAT-NO: 6549893

DOCUMENT-IDENTIFIER: US 6549893 B1

TITLE: System, method and article of manufacture for a goal based system utilizing a time based model

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Claims	FIGS	Draw Dg
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☐ 17. Document ID: US 6542880 B2

L6: Entry 17 of 56

File: USPT

Apr 1, 2003

US-PAT-NO: 6542880

DOCUMENT-IDENTIFIER: US 6542880 B2

TITLE: System, method and article of manufacture for a goal based system utilizing a table based architecture

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Claims	FIGS	Draw Dg
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☐ 18. Document ID: US 6536037 B1

L6: Entry 18 of 56

File: USPT

Mar 18, 2003

US-PAT-NO: 6536037

DOCUMENT-IDENTIFIER: US 6536037 B1

**** See image for Certificate of Correction ****

TITLE: Identification of redundancies and omissions among components of a web based architecture

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	FIGS	Drawings
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☐ 19. Document ID: US 6535861 B1

L6: Entry 19 of 56

File: USPT

Mar 18, 2003

US-PAT-NO: 6535861

DOCUMENT-IDENTIFIER: US 6535861 B1

TITLE: Goal based educational system with support for dynamic characteristics tuning using a spread sheet object

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	FIGS	Drawings
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☐ 20. Document ID: US 6519571 B1

L6: Entry 20 of 56

File: USPT

Feb 11, 2003

US-PAT-NO: 6519571

DOCUMENT-IDENTIFIER: US 6519571 B1

TITLE: Dynamic customer profile management

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	FIGS	Drawings
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Clear	Generate Collection	Print	Fwd Refs	Bkwd Refs	Generate OACS
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Terms	Documents
L5 and business near3 plan\$4	56

Display Format:

Change Format

[Previous Page](#)

[Next Page](#)

[Go to Doc#](#)

Hit List

Search Results - Record(s) 1 through 10 of 56 returned.

☐ 1. Document ID: US 6721747 B2

L6: Entry 1 of 56

File: USPT

Apr 13, 2004

US-PAT-NO: 6721747

DOCUMENT-IDENTIFIER: US 6721747 B2

TITLE: Method and apparatus for an information server

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	Keywords	Drawings
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☐ 2. Document ID: US 6721713 B1

L6: Entry 2 of 56

File: USPT

Apr 13, 2004

US-PAT-NO: 6721713

DOCUMENT-IDENTIFIER: US 6721713 B1

TITLE: Business alliance identification in a web architecture framework

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	Keywords	Drawings
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☐ 3. Document ID: US 6717686 B1

L6: Entry 3 of 56

File: USPT

Apr 6, 2004

US-PAT-NO: 6717686

DOCUMENT-IDENTIFIER: US 6717686 B1

TITLE: Electronic printing system and method

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	Keywords	Drawings
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☐ 4. Document ID: US 6701345 B1

L6: Entry 4 of 56

File: USPT

Mar 2, 2004

US-PAT-NO: 6701345

DOCUMENT-IDENTIFIER: US 6701345 B1

TITLE: Providing a notification when a plurality of users are altering similar data in a health care solution environment

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Abstract	Claims	KWMC	Draw D
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☐ 5. Document ID: US 6697824 B1

L6: Entry 5 of 56

File: USPT

Feb 24, 2004

US-PAT-NO: 6697824

DOCUMENT-IDENTIFIER: US 6697824 B1

TITLE: Relationship management in an E-commerce application framework

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Abstract	Claims	KWMC	Draw D
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☐ 6. Document ID: US 6671818 B1

L6: Entry 6 of 56

File: USPT

Dec 30, 2003

US-PAT-NO: 6671818

DOCUMENT-IDENTIFIER: US 6671818 B1

**** See image for Certificate of Correction ****

TITLE: Problem isolation through translating and filtering events into a standard object format in a network based supply chain

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Abstract	Claims	KWMC	Draw D
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☐ 7. Document ID: US 6662357 B1

L6: Entry 7 of 56

File: USPT

Dec 9, 2003

US-PAT-NO: 6662357

DOCUMENT-IDENTIFIER: US 6662357 B1

TITLE: Managing information in an integrated development architecture framework

Full	Title	Citation	Front	Review	Classification	Date	Reference	Abstract	Abstract	Claims	KWMC	Draw D
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☐ 8. Document ID: US 6658398 B1

L6: Entry 8 of 56

File: USPT

Dec 2, 2003

US-PAT-NO: 6658398

DOCUMENT-IDENTIFIER: US 6658398 B1

TITLE: Goal based educational system utilizing a remediation object

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	KWIC	Drawings
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☐ 9. Document ID: US 6643652 B2

L6: Entry 9 of 56

File: USPT

Nov 4, 2003

US-PAT-NO: 6643652

DOCUMENT-IDENTIFIER: US 6643652 B2

TITLE: Method and apparatus for managing data exchange among systems in a network

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	KWIC	Drawings
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☐ 10. Document ID: US 6629081 B1

L6: Entry 10 of 56

File: USPT

Sep 30, 2003

US-PAT-NO: 6629081

DOCUMENT-IDENTIFIER: US 6629081 B1

**** See image for Certificate of Correction ****

TITLE: Account settlement and financing in an e-commerce environment

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	KWIC	Drawings
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Clear	Generate Collection	Print	Fwd Refs	Bkwd Refs	Generate OACS
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Terms	Documents
L5 and business near3 plan\$4	56

Display Format: TI [Previous Page](#)[Next Page](#)[Go to Doc#](#)